



# 1:1 HOMEBUYER SERVICES - INTAKE FORM

For Office Use Only:

Case Number \_\_\_\_\_  In-Person Counseling  
Date of Intake: \_\_\_\_\_  Telephone Counseling  
If phone, provide reason: \_\_\_\_\_

## Individual #1

Name: \_\_\_\_\_  
(Please print) First MI Last  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State\_\_MN\_\_  
Zip: \_\_\_\_\_ County: \_\_\_\_\_  
Home Phone: \_\_\_\_\_  
Work Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Preferred contact method: \_\_\_\_\_  
Preferred language: \_\_\_\_\_

## Individual #2

Name: \_\_\_\_\_  
(Please print) First MI Last  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State\_\_MN\_\_  
Zip: \_\_\_\_\_ County: \_\_\_\_\_  
Home Phone: \_\_\_\_\_  
Work Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Relationship to Individual #1: \_\_\_\_\_

### Individual #1 (only) please continue:

1. How did you hear about us?

- Mailer, Flyer, or Brochure
- Friend or Relative
- I took a workshop
- Newspaper
- Internet
- Realtor
- Agency (which one: \_\_\_\_\_)
- Lender / Mortgage Company
- Other: \_\_\_\_\_

2. Have you received financial services from another agency? (DMP, credit repair, financial lit, etc.)  Yes  No

If yes, please note the type and length of services:

3. Race: (select one)

#### Single Race

- American Indian / Alaskan Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

#### Multiple Race

- American Indian / Alaskan Native & White
- American Indian / Alaskan Native & Black
- Asian & White
- Black or African American & White
- Native Hawaiian/Other Pacific Islander & Black
- Other race: \_\_\_\_\_

4. Your ethnicity:  Hispanic or Latino  Non-Hispanic

5. Number of people in household: \_\_\_\_\_

6. Your gender:  Male  Female

**Information about Individual #1 (continued):**

7. Are you a veteran?  Yes  No
8. Are you a single parent household?  Yes  No
9. Were you born outside of the U.S.?  Yes  No
10. Do you need an interpreter?  Yes  No
11. Your age: \_\_\_\_\_
12. Are you disabled?  Yes  No
13. Please check the highest education level you completed:
- Some high school                       Some college or trade school                       Bachelor's degree
- High school diploma / GED                       Associates degree                       Graduate or professional degree
14. Marital Status:  Single  Married  Divorced  Widow
15. Active Military?  Yes  No
16. Are you a First Time Homebuyer?  Yes  No
17. Income. Please include income for all individuals in your household from all sources:

Name	Income Source and pay frequency Ex. \$1500 paid every 2 weeks	Length of time	Gross Monthly Income	Net Monthly Income
			\$	\$
			\$	\$
			\$	\$
			\$	\$

18. What was your household annual gross income (you can find this on last year's taxes)? \$ \_\_\_\_\_
19. Have you experienced a home foreclosure or bankruptcy within the past 3 years?  Yes  No  
If yes, please provide details:
20. Do you currently have a checking/savings account?  Yes  No
21. Current housing:  Rent  Own  Staying with family/friends                      **Current rent payment \$ \_\_\_\_\_**
22. How many children under 18 years of age in the household? \_\_\_\_\_
23. Did you complete a Home Stretch workshop or Framework course online?  Yes  No  
If yes, location & date:
24. Have you applied for a mortgage loan or have you signed a purchase agreement?  Yes  No

**If you answered yes to the previous question, please complete the purchase property information for your new home here:**

Purchase property address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Purchase price: \$ \_\_\_\_\_

Loan amount: \$ \_\_\_\_\_ Loan interest rate: \_\_\_\_\_ % Closing date: \_\_\_\_\_

Lender (Bank/Mortgage Co.): \_\_\_\_\_ Loan program (FHA, RD, etc.): \_\_\_\_\_

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Advisor/Coach Name: \_\_\_\_\_

Appointment Type:  In-person     Telephone

1:1 Screening (Case Term):  Financial Wellness (Long Term)     Homebuyer Counseling (Short Term)

*Financial snapshot at intake*

Monthly Debt: Total of minimum payments: \$ \_\_\_\_\_

Debt: Total balance owed: \$ \_\_\_\_\_

Current Savings (total of cash, non-retirement savings) \$ \_\_\_\_\_

FICO Credit Score: \_\_\_\_\_     No score     Client declined